



Percent Pledge.

Giving Platform

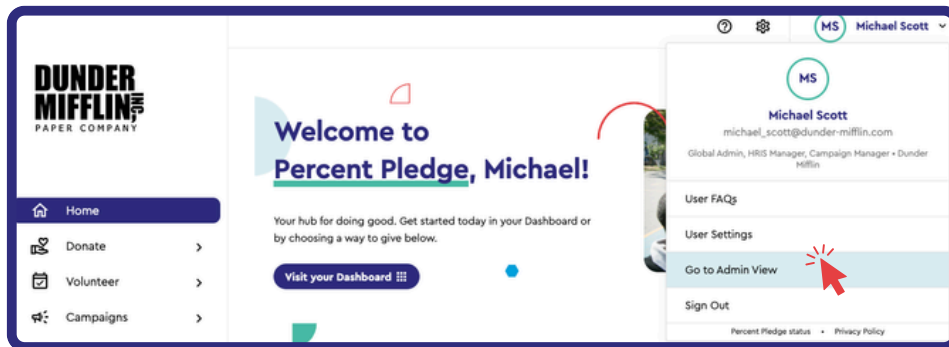
Admins can now set up their own custom Cause Portfolios! Help direct giving to a specific cause area, or uplift community organizations your company partners with.

How to

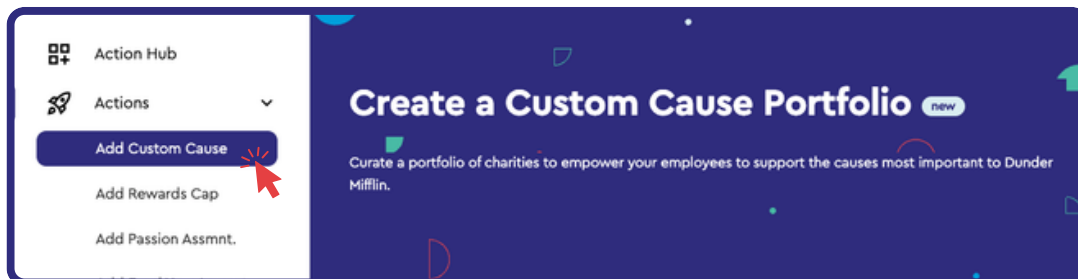
Create a Custom Cause Portfolio

Drive engagement to featured nonprofits by following these steps!

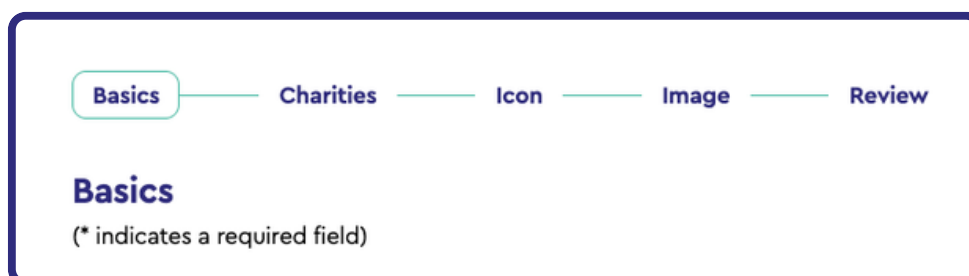
1 Log in to your Admin Dashboard.



2 From the Actions dropdown, select "Add Custom Cause."



3 Fill out the required info through the 5 screens. Let's do it together.



4

Name your Cause Portfolio and add a description.

Basics

(* indicates a required field)

What would you like to call your Cause Portfolio?*

Holiday Giving Community Partners

Description*

Please write a description for your Cause Portfolio.

B I T U      

Dunder Mifflin is excited to support our community partners during this holiday giving season!

5

Select 3-5 charities you would like to feature.

*Tip, use the EIN or charity code to identify the exact charity/chapter you'd like to support.

Charities

(* indicates a required field)

Select the charities to include in your Cause Portfolio.

Select 1 or more countries:

*** United States**

Search our database of nearly 2M charities, and select the ones you want to support:

*** American National Red Cross**  *** Boys & Girls Clubs of America** 

*** Feeding America** 

6

Upload a PNG or JPEG icon for your Cause Portfolio.

*Tip, we recommend using a square image with a transparent background.

Where employees will see your icon



Holiday Giving Community...

Dunder Mifflin

In the portfolio list



Holiday Giving Community...

Dunder Mifflin

On hover



In the page side bar

7

Add a Cause Portfolio image and preview what it will look like.

*Tip, Upload a PNG or JPEG image for your Cause Portfolio page. We recommend an image at least 800 by 800 pixels.



8

Review the details and submit when you're ready!



9

Your Cause Portfolio will immediately publish and become accessible to your employees in the donation flow and Cause Portfolio menu!

